TESA Grant Offer Acceptor
User Guide

TEMPLATE ONLY - NOT TO BE ISSUED

Department for
**Communities and
Local Government**

Table of Contents

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Introduction

How to use this guide

This user guide is designed to support you following your TESA training. The guide is broken down into clear sections so that you can pick out the functionality that you are interested in re-visiting, revising or reminding yourself of. The user guide can be used in conjunction with the online help within the TESA system.

About Grant Offer Acceptors

The Grant Offer Acceptor role allows a user to:

- TBC

Grant Offer Acceptor Objectives

At the end of this session you will be able to:

- Accept a project

About the Grant Offer Acceptor

The Grant Offer Acceptor is an external Applicant, and can accept the details contained within the offer letter.

Note to Trainer

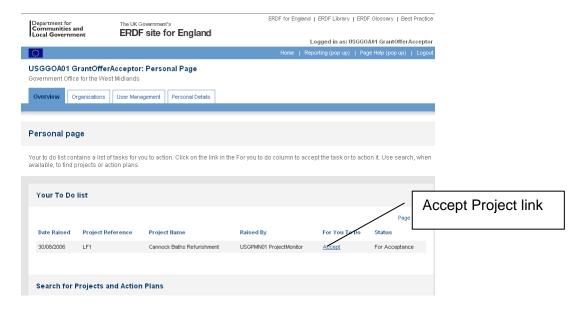Remind delegate that Project 2 will take a round about route.

Since the Grant Offer Acceptor is an external person we will not be reviewing the Offer. Just add a comment, click on Next, and Accept it

To Do List Overview

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Your To Do list displays all tasks relevant to the role or roles that you have been allocated. For the purpose of this guide we will focus only on tasks relevant to the Grant Offer Acceptor.
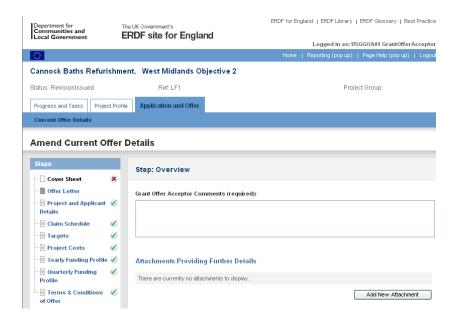
For the Grant Offer Acceptor, the To Do list shows all claims that require review and those which are currently being reviewed by other Grant Offer Acceptors. Where a claim is being reviewed by another Grant Offer Acceptors, their name will display in the Status column.

1. Use the <u>Accept</u> link to open the project. The Cover sheet is the first screen to display. The Cover Sheet is the last page you should visit.

2. The Cover Sheet screen displays. The Cover Sheet should be the last screen you visit. Use the Steps navigation pane to move to the required page.
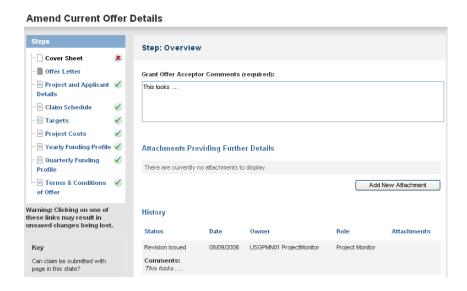
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Accept the Offer

1. If necessary, select the project from your To Do List.

2. Enter a comment on the Cover Sheet.

3. Scroll down and click on the Next Steps button.

4. Click on the Accept button. The draft project is forwarded to the Project Monitor to be made live.

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Community Centre, West Midlands Objective 2

Status: RevisionIssued   Ref: LFCC4   Project Group:

| Progress and Tasks | Project Profile | Application and Offer |

View Offer Letter

Steps	**Step: Offer Letter Generation**
📄 Cover Sheet ✔	Click the Create Offer Letter link below to generate a new Offer Letter.
📄 Offer Letter	
📄 Project and Applicant Details ✔	NOTE: If you do not have Microsoft Office installed, you can install Microsoft's Word Viewer 2003 for reading Word documents by clicking the Install Word Viewer 2003 link below. If you see a security warning dialog box on clicking this link, you will need to click the Run button twice, then follow the onscreen instructions to install the viewer.
📄 Claim Schedule ✔	
📄 Targets ✔	
📄 Project Costs ✔	Install Word Viewer 2003 Create Offer Letter
📄 Yearly Funding Profile ✔	
📄 Quarterly Funding Profile ✔	[Previous Step] [Next Step]
📄 Terms & Conditions of Offer ✔	[Select a person to route this project to ▾] [Route] [Accept] [Reject]

Click on the Accept button.

Logout

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Logged in as: USGPMN01 ProjectMonitor

| Home | Reporting (pop up) | Page Help (pop up) | Logout |

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